

# *myridas*<sup>TM</sup> *User Guide*

Version 8.0 for Great Plains 8.0

## **Catalogue Based Sales**

Trinity Computer Services Limited

March 2005

# Contents

<b>CONTENTS .....</b>	<b>2</b>
<b>USING THIS GUIDE .....</b>	<b>4</b>
<b>ABOUT MYRIDAS .....</b>	<b>5</b>
<b>CATALOGUE BASED SALES.....</b>	<b>6</b>
<i>Item Attributes.....</i>	<i>6</i>
<i>Catalogue Sections.....</i>	<i>6</i>
<i>Catalogue Maintenance .....</i>	<i>6</i>
<i>Catalogue Tree View.....</i>	<i>7</i>
<i>Item Catalogue and Search.....</i>	<i>7</i>
<i>Additional Module Functionality .....</i>	<i>7</i>
<b>SETUP .....</b>	<b>9</b>
1. MAINTAIN ITEM ATTRIBUTES WINDOW .....	9
1.1 <i>Creating and Editing Item Attributes .....</i>	<i>9</i>
2. ASSIGN ITEMS TO ATTRIBUTES WINDOW .....	10
2.1 <i>Assigning Items to Attributes.....</i>	<i>11</i>
3. ASSIGN ITEM RANGE TO ATTRIBUTE WINDOW .....	12
3.1 <i>Assigning an Item Range to an Attribute .....</i>	<i>12</i>
4. ASSIGN ATTRIBUTES TO ITEMS WINDOW .....	14
4.1 <i>Assigning Attributes To Items .....</i>	<i>14</i>
5. CATALOGUE SECTIONS WINDOW.....	16
5.1 <i>Creating Catalogue Sections.....</i>	<i>16</i>
6. CATALOGUE MAINTENANCE WINDOW .....	18
6.1 <i>Creating and Maintaining Catalogues.....</i>	<i>19</i>
7.1 <i>Assigning Item Ranges to Catalogue Sections .....</i>	<i>22</i>
<b>INVENTORY .....</b>	<b>23</b>
8. MAINTAIN ITEM CATALOGUE LOOKUP DEFAULTS WINDOW .....	23
8.1 <i>Setting defaults for the Item Catalogue Lookup window .....</i>	<i>23</i>
9. ITEM CATALOGUE LOOKUP WINDOW .....	26
9.1 <i>Using the Item Catalogue Lookup window .....</i>	<i>27</i>
<b>SALES.....</b>	<b>30</b>
10. MAINTAIN ITEM CATALOGUE AND SEARCH DEFAULTS WINDOW.....	30
10.1 <i>Setting defaults for the Item Catalogue and Search window .....</i>	<i>30</i>
11. ITEM CATALOGUE AND SEARCH WINDOW.....	33
11.1 <i>Using the Item Catalogue and Search window .....</i>	<i>34</i>
<b>APPENDIX A.....</b>	<b>38</b>
ACCESS TO MYRIDAS WINDOWS .....	38
<i>Catalogue Based Sales.....</i>	<i>38</i>
<b>APPENDIX B .....</b>	<b>40</b>
INCREASED FUNCTIONALITY WITH ADDITIONAL MYRIDAS MODULES .....	40
<b>APPENDIX C.....</b>	<b>42</b>
MARGIN PERCENTAGE SETUP WINDOW .....	42
<i>Setting Up Document Margin Calculation Details .....</i>	<i>42</i>

**INDEX .....43**

## Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Catalogue Based Sales module:

- Catalogue Based Sales



The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See [Appendix A](#) for a list of Myridas windows and their location in the software.

A full range of tutorials is also available on our website, <http://www.trinitypartner.com>.

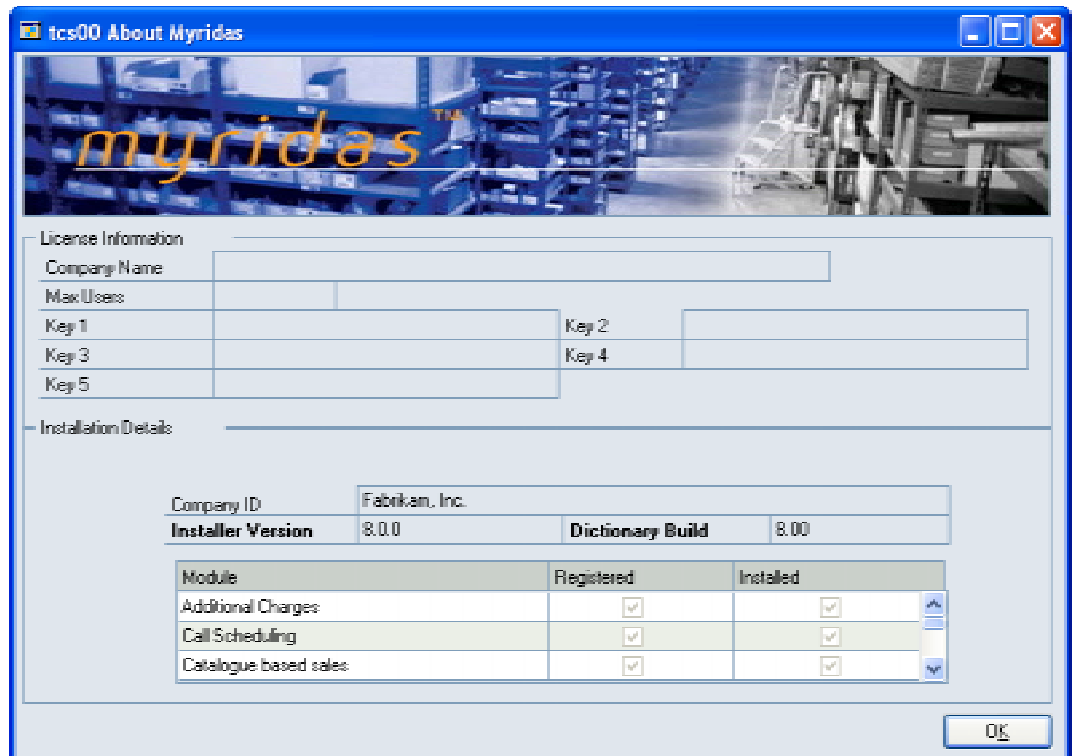
# About Myridas



*Help >> About Myridas*

Use the About Myridas window to check your license information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

*The About Myridas window*



## Catalogue Based Sales

The Myridas Catalogue Based Sales module provides extended functionality for item maintenance and sales transactions. The core functionality of the module is implemented in the Item Catalogue and Search window where the user can identify items by specified attributes, or by browsing the Item Catalogue.

The visual display of the catalogue and advanced search parameters allow the user to immediately fulfil requirements for an order, find alternative items or even email an item specification to a customer.

The main features of Catalogue Based Sales are:

- The facility to create attributes and assign them to items
- The facility to create an item catalogue up to five levels deep
- The facility to perform searches for suitable items based on attributes, catalogue location or spelling, all from within one user-friendly window
- Integration with Sales Transaction Entry allowing rapid order completion
- Integration with Item Maintenance allowing rapid item location

### Item Attributes

Item attributes allow the user to perform specified searches in the Item Catalogue and Search window, so that in Sales Transaction Entry the required item may be located with greater speed and accuracy. An unlimited number of attributes may be stored in one Attribute Group. Use the [Maintain Item Attributes window](#) to create and edit Attribute Groups and attributes.

Items may be assigned one or multiple attributes (unlimited) using the [Assign Items To Attributes window](#) and the [Assign Attributes To Items window](#). Unlimited numbers of items can all be assigned the same attribute.

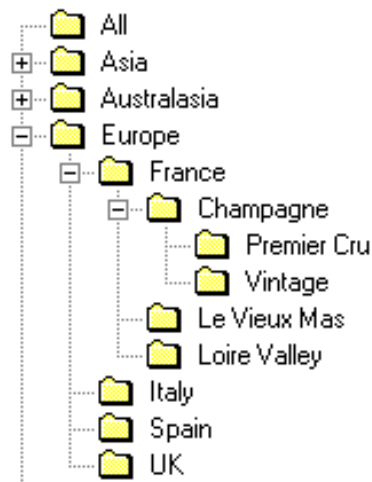
### Catalogue Sections

An Item Catalogue can be made up of up to five different levels, each level containing an unlimited number of sections. Create and edit catalogue sections and levels in the [Catalogue Sections window](#).

### Catalogue Maintenance

A catalogue can be built up using the levels and sections that you have created in the Catalogue Sections window. This catalogue will be displayed as a tree view.

## Catalogue Tree View



Items can be assigned at the lowest level of the catalogue, and will automatically be assigned to the parent levels. An item can be assigned to more than one position in the catalogue. To build up a catalogue and assign items to levels use the [Catalogue Maintenance window](#).

## Item Catalogue and Search

The results of the attribute and catalogue maintenance are displayed in the [Item Catalogue and Search window](#), an Extras option in Great Plains Sales Transaction Entry and the Item Catalogue Lookup window, an Extras option in Great Plains Item Maintenance. Dependant upon the default settings initiated in the [Maintain Item Catalogue and Search Defaults window](#) you can use the catalogue and item attributes to rapidly locate an item and add it to a sales transaction. You also have the option when setting defaults to choose whether or not the catalogue and attributes are displayed in this window, for example, you could set the window to display the catalogue and search but not attributes, to display attributes only and so on. From this window you can also see multiple item properties (such as cost, quantity available and where applicable an item image) and view numerous other relevant windows.

## Additional Module Functionality

The item catalogue is given additional functionality when used in conjunction with other Myridas modules. See [Appendix B](#) for details of this functionality.



## Setup

### 1. Maintain Item Attributes window

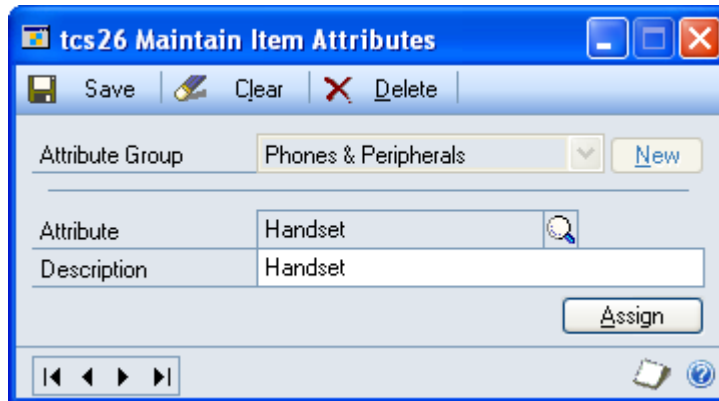


*Cards >> Myridas >> Catalogue Based Sales >> Attributes Maintenance*

Use the Maintain Item Attributes window to:

- Create and Maintain Item Attributes

*The  
Maintain  
Item  
Attributes  
window*

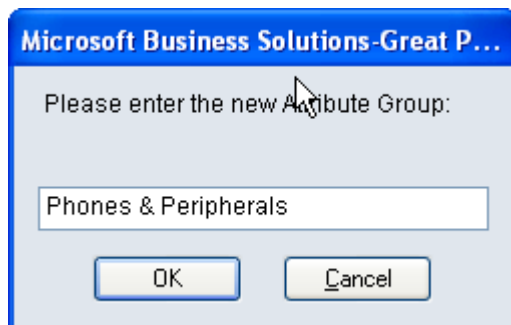


#### 1.1 Creating and Editing Item Attributes

**To create and maintain item attributes in the Maintain Item Attributes window:**

1. To create a new attribute group click the New button. This will open the Add New Attribute Group window.

*The Add New  
Attribute  
Group  
window*



2. Enter the Name of your new Attribute Group then click OK.

Note that you can click Cancel to return to the Maintain Item Attributes window.

3. Once you have entered a new Attribute Group (or selected an existing Attribute Group from the drop-down menu) enter the attribute and description that you want to assign to the Attribute Group.

- If you want to assign the attribute to an item or items now then click the Assign button to display the [Assign Items To Attributes window](#).

Note that if you click Assign without first saving any new attributes you have created you will be asked whether you want to save changes. Click Yes to save the attribute and continue to the Assign Items To Attributes window. If you click No the Assign Items To Attributes window will still be displayed but the new attribute will not have been saved.

- If you don't want to assign the attribute to an item or items now then click Save to save the new attribute, and if applicable the Attribute Group.

Note that you can click Clear at any point to clear any changes you have made.

*Deleting attributes and attribute groups*

To delete an attribute click the Delete button. If there are no attributes held against an Attribute Group then clicking Delete will delete the Attribute Group.

## 2. Assign Items To Attributes window



*Cards >> Myridas >> Catalogue Based Sales >> Assign Item Numbers To Attributes*

Use the Assign Items To Attributes window to:

- Assign items to attributes

*The Assign Items To Attributes window*

Item Number	Description
PHON-ATT-5354	Cordless-Attractive 5354
PHON-ATT-53BK	Cordless-Attractive 5352-Black
PHON-ATT-53BL	Cordless-Attractive 5352-Blue
PHON-ATT-53RD	Cordless-Attractive 5352-Red
PHON-ATT-53WH	Cordless-Attractive 5352-White

## 2.1 Assigning Items to Attributes

### **To assign items to attributes in the Assigning Items To Attributes window:**

1. Select an attribute group from the drop-down menu.

Note that if you have opened this window from the Maintain Item Attributes window then the Attribute Group and attribute will already be displayed.

2. Select an attribute from the drop-down menu. All items already assigned to this attribute will be displayed in the scrolling window.
3. To assign a new item to the attribute enter into the next free line in the scrolling window the Item Number that you want to assign to the attribute or click the lookup to select an item from the Items window. As many items as required can be added to the scrolling window.
4. Click Save to save any new items assigned to the selected attribute.

Note that you can click the Sort button to redisplay items in the scrolling window in alphabetical order. Clicking Clear will remove your selections from the window, saving any changes that you have made to your selection.

5. If you want to assign items by range to an attribute then click the Ranges button to display the Assign Item Range To Attribute window.

#### *Deleting assigned attributes*

To unassign all displayed items from an attribute click the Delete button. To unassign a single line (i.e.: a single item) from an attribute click Edit then the Delete Row option.

### 3. Assign Item Range To Attribute window



*Assign Items To Attributes window >> Ranges*

Use the Assign Item Range To Attribute window to:

- Assign item ranges to an attribute

*The Assign Item Range To Attribute window*

Item Number	Item Description	Class ID	Item Short Name
PHON-ATT-5354	Cordless-Attractive 5354		
PHON-ATT-53BK	Cordless-Attractive 5352-Black		
PHON-ATT-53BL	Cordless-Attractive 5352-Blue		
PHON-ATT-53RD	Cordless-Attractive 5352-Red		
PHON-ATT-53WH	Cordless-Attractive 5352-White		

#### 3.1 Assigning an Item Range to an Attribute

**To assign an item range to an attribute in the Assign Item Range To Attribute window:**

The Assign Item Range To Attribute window will open with details of the current attribute selection. Item ranges are assigned by Item Number, Generic Description and by Class ID.

1. Click All to assign all records or From to assign a selection of records for Item Number, Generic Description and Class ID. If you select From, enter To and From values to specify a range, or use the lookups.

2. You can further specify your range by using the Contains/Begins with option. From the drop-down menu select between Item Number, Item Description, Item Class and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you have selected Consumables as a Class ID Range, but know that you only want to assign the attribute to Consumables that contain the letters "Ch", you could select Item Class, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e.: upper or lower case) will be taken account of in defining your selected range, so Item Classes containing "Ch" would be included in the range, those with "ch" would not be included.



3. Click the Preview button to view your selection in the scrolling window. The Item Number and Item Description of each item to be assigned will be displayed. Click the Show button to display the Generic Description, Class ID and Item Short Name.
4. Use the Unmark All and Mark All to deselect/select all items displayed in the scrolling window. Alternatively, you can click on each items check box to mark/unmark it.
5. Click the Transfer button to assign the selected item range to the attribute. Click OK to close the Transfer completed successfully dialog box.
6. Click OK to return to the Assign Items To Attributes window.

Note that you can click OK at any point to return to the Assign Items To Attributes window without saving any changes.

## 4. Assign Attributes To Items window

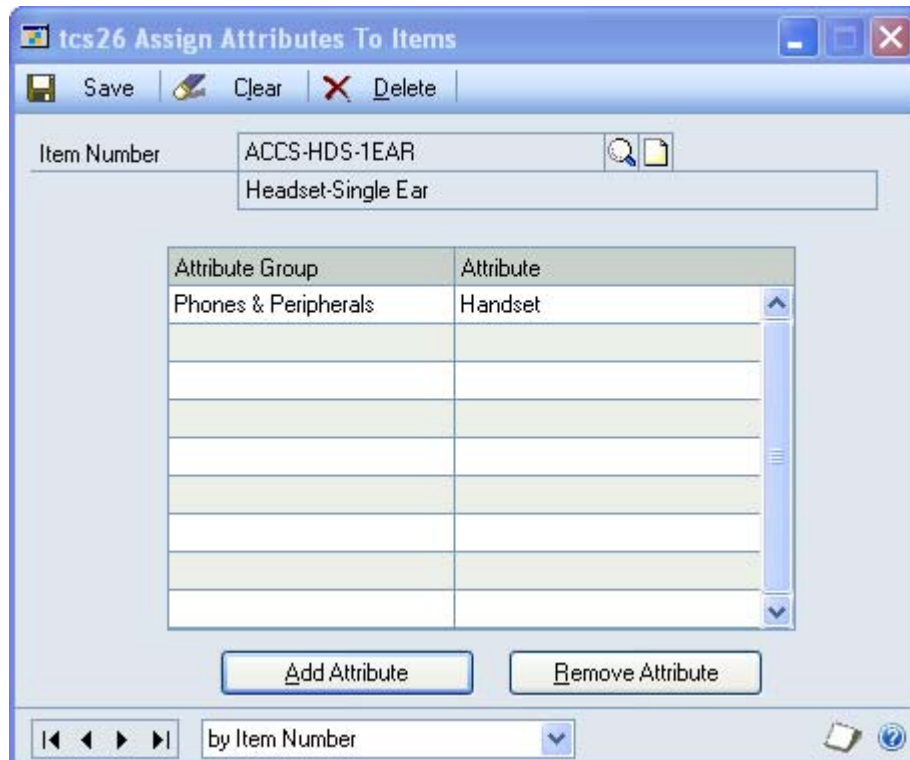


*Cards >> Myridas >> Catalogue Based Sales >> Assign Attributes to Item Numbers*

Use the Assign Attributes To Items window to:

- Assign attributes to items

*The Assign Attributes To Items window*

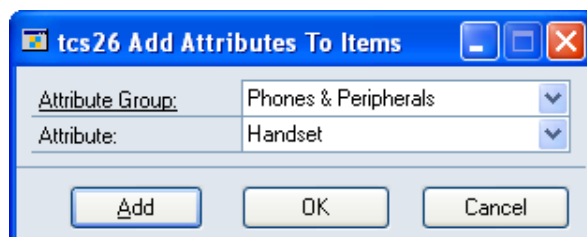


### 4.1 Assigning Attributes To Items

**To assign attributes to items in the Assign Attributes To Items window:**

1. Enter the Item Number that you want to assign attributes to or click the lookup to select an item from the Items window. All attributes already assigned to the item will be displayed in the scrolling window.
2. If you want to add an attribute to the item click the Add Attribute button. This will display the Add Attributes to Items window.

*The Add Attributes To Items window*



3. Select the Attribute Group and specific attribute that you want to assign to the item from the drop-down menus.
4. Click Add to assign the attribute to the item and keep the secondary window open. Click OK to assign the attribute to the item and close the secondary window.
5. If you want to remove a single attribute from an item click on the item line then click the Remove Attribute button. If you want to remove all attributes assigned to an item click on the attribute then click Delete.
6. To save attributes assigned to an item click Save.

Note that you can click Clear at any point to clear the Item and attribute selections. Any changes that you have made **will** be saved.

## 5. Catalogue Sections window

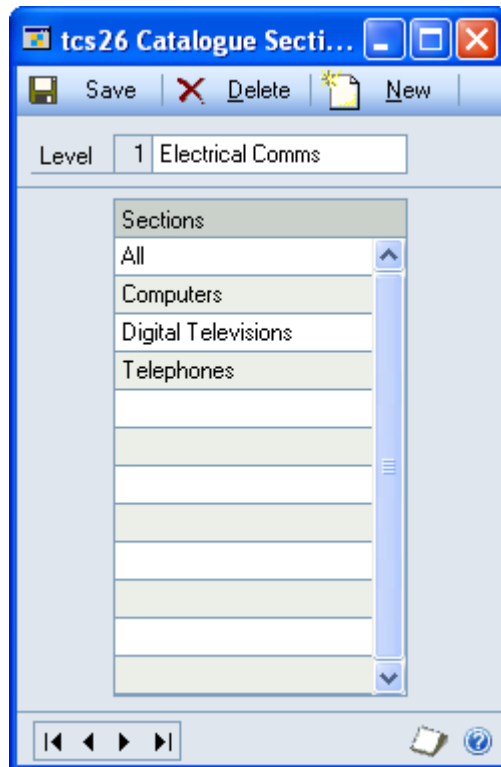


*Cards >> Myridas >> Catalogue Based Sales >> Catalogue Section Maintenance*

Use the Catalogue Sections window to:

- Create catalogue sections

*The  
Catalogue  
Sections  
window*



### 5.1 Creating Catalogue Sections

The item catalogues are made up of sections and levels. The Catalogue Sections window will allow you to create up to five levels in a catalogue. You could, for example, create Level 1 as World Regions, Level 2 as Countries and Level 3 as Wine Regions. Unlimited sections may be set up for each catalogue level.

**To create catalogue sections in the Catalogue Sections window:**

1. Enter the title of your first catalogue level in the Level 1 Box.
2. Click on the scrolling window and enter as many sections to the catalogue level (one on each line of the scrolling window) as you require.
3. Click the Save button to save your new catalogue level.

4. To create a new catalogue level click the New button. This will open as Level 2, where you should repeat steps 1 to 3. These steps should be repeated until you have set up all your catalogue levels.

*Editing and  
Deleting  
Catalogue  
Levels and  
sections*

You can edit Catalogue sections and levels by clicking on the required text and editing as required then clicking Save to save your changes. You can add a new section to a current level by clicking on the next free line in the scrolling window and following the steps above. To delete a catalogue section click the Delete Row option under Edit. To delete a catalogue level click the Delete button.

Note that if you attempt to delete a level of a catalogue that contains items, then you will be given the warning "This Level is still in use - Cannot delete".

You can only delete a catalogue section if items have not been assigned to that section in the Catalogue Maintenance window (see below).

Also note that you can only delete the lowest level of a catalogue - i.e.: you could not delete Level 2 of a Catalogue without first deleting Level 3.

## 6. Catalogue Maintenance window

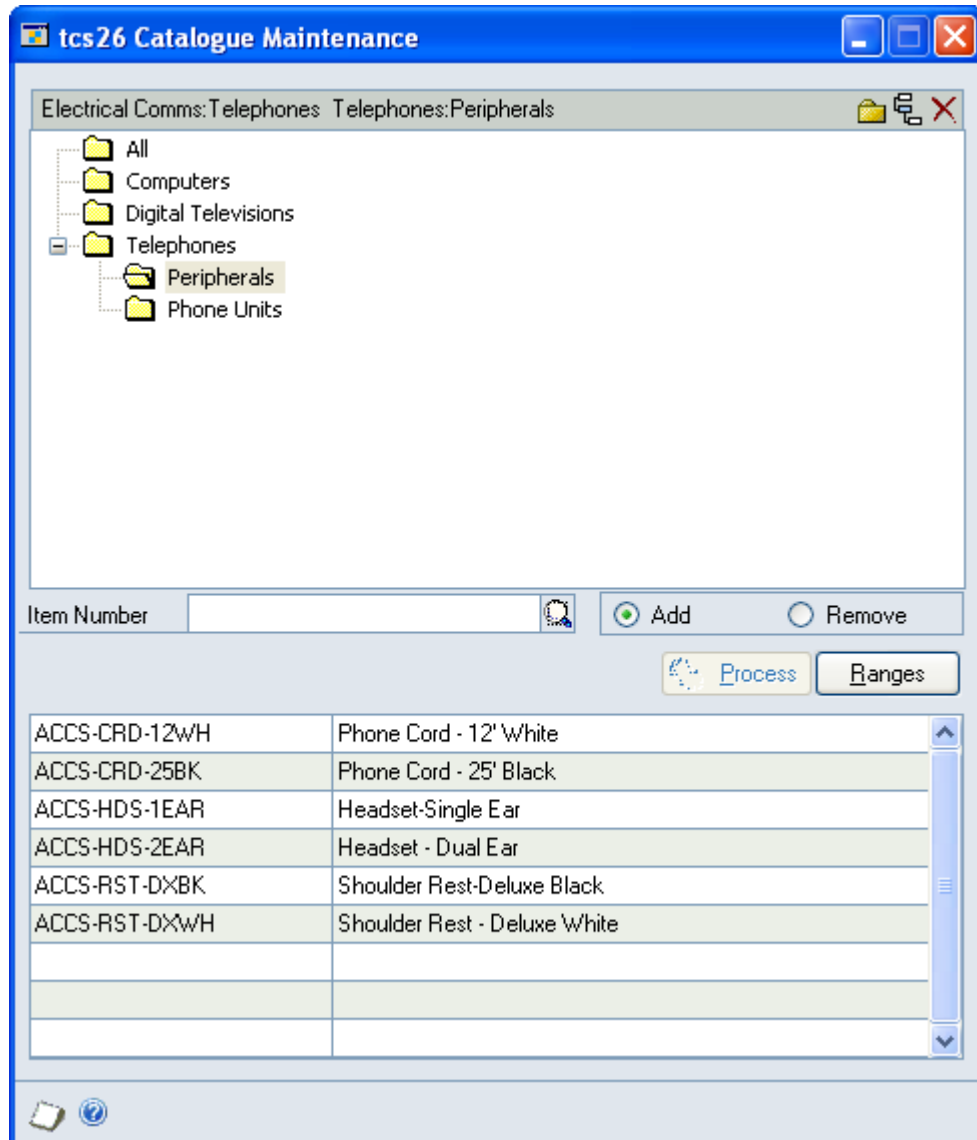


*Cards >> Myridas >> Catalogue Based Sales >> Catalogue Maintenance*

Use the Catalogue Sections window to:

- Create and maintain catalogue sections

*The  
Catalogue  
Maintenance  
window*



## 6.1 Creating and Maintaining Catalogues

**To create and maintain catalogues in the Catalogue Maintenance window:**

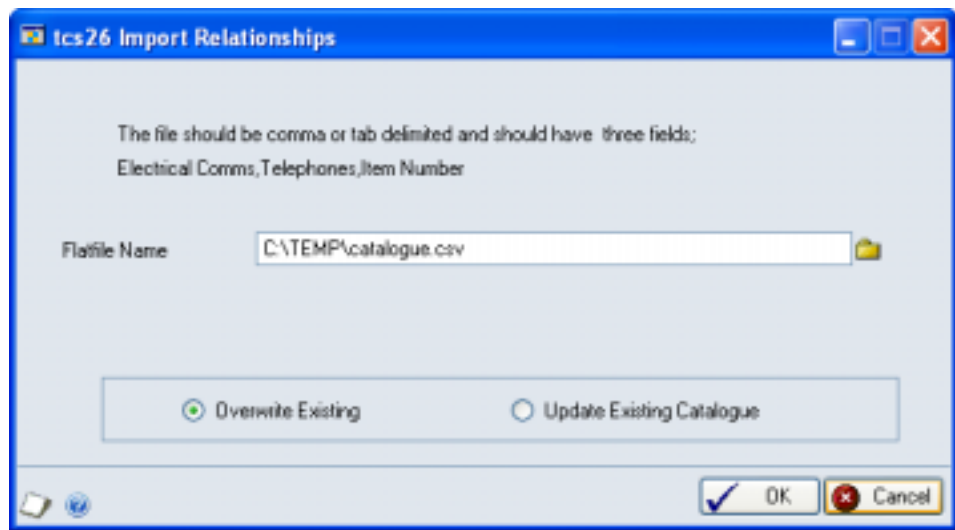
1. You can create catalogues manually or by importing a flatfile.

1.1 To import a flatfile:



- a) Click the Import Catalogue button. This will open the Import Relationships window.

*The Import Relationships window*



- b) Enter the Flatfile Name or use the lookup to locate the flatfile on your system.

When creating a flatfile to import, the flatfile should contain the same number of fields as you have created catalogue sections in the [Catalogue Sections window](#) (see window image above). You cannot import a flatfile unless you have already created catalogue sections in the Catalogue Sections window. Do not create a header field, as this will also be imported. The Flatfile must be saved as a .csv or .txt file type.

Note that a Flatfile could be created from, for example, an Excel spreadsheet.

*Sample Flatfile*

Europe	France	Le Vieux Vin	Chardonnay
Europe	France	Le Vieux Vin	Chenin Blanc
Europe	France	Le Vieux Vin	Montrachet

- c) If you want to overwrite any current catalogue then click Overwrite Existing. If you want to update a current catalogue with the flatfile then click Update Existing Catalogue.



- d) Click OK to import the flatfile. If there are any problems with the flatfile import then a warning will be displayed.

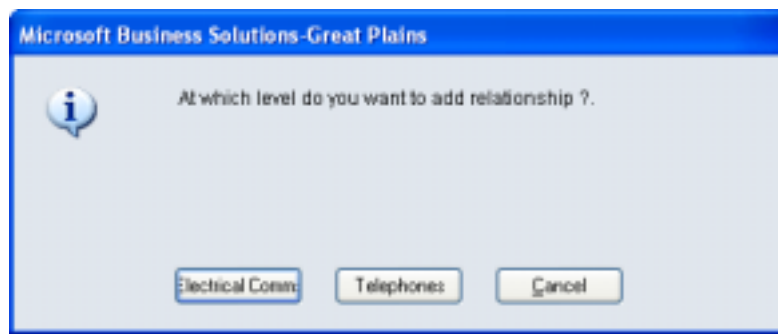
Note that you can click Cancel at any point to close the Import Relationships window.

## 1.2 To manually create catalogues:



- a) Click the Add Relationship button. This will open the Catalogue Section Lookup window.
- b) Select the catalogue section that you want to add.
- c) To add lower-level catalogue sections, highlight the section you want to add a section to and click the Add Relationship button. A dialogue box will be displayed asking at what level you want to add the relationship. For example if you have set up catalogue levels of World Region and Countries, the dialogue box will be displayed as shown below.

*Add  
Relationship  
Dialogue  
Box*



Click on the level you want to add a relationship for.

- d) The Catalogue Sections Lookup window will be displayed showing the appropriate level. Click on the section you want to add then click Select. This section will be added to the required location in the catalogue.



Note that you can delete a catalogue section at any point by clicking on the appropriate section then clicking the delete button.

2. To add an Item Number to a catalogue section click on the appropriate catalogue section then enter an Item Number or use the lookup to select an Item Number from the Items window.
3. Click Add then click the Process button. The item will be displayed in the scrolling window whenever its section is highlighted in the upper window.
4. To remove an item from a catalogue section repeat steps 2 and 3, clicking the Remove button rather than the Add button.

Note that you can also add/remove ranges of items to/from a catalogue section by clicking the Ranges button.

## 7. Assign Item Range To Section window



Catalogue Maintenance window >> Ranges button

Use the Assign Item Range To Section window to:

- Assign item ranges to a catalogue section
- Remove item ranges from a catalogue section

*The Assign Item Range To Section window*

Level: Telephones | Peripherals | Assign Items to Section

Item Number:  All  From: ACCS-CRD-12WH To: ACCS-RST-DXWH

Generic Description:  All  From: To:

Class ID:  All  From: To:

Item Description: [v] Contains [ ]  Ignore Case

Item Number	Item Description	Class ID	Item Short Name	Include
ACCS-CRD-12WH	Phone Cord - 12' White			<input checked="" type="checkbox"/>
ACCS-CRD-25BK	Phone Cord - 25' Black			<input checked="" type="checkbox"/>
ACCS-HDS-1EAR	Headset-Single Ear			<input checked="" type="checkbox"/>
ACCS-HDS-2EAR	Headset - Dual Ear			<input checked="" type="checkbox"/>
ACCS-RST-DXBK	Shoulder Rest-Deluxe Black			<input checked="" type="checkbox"/>
ACCS-RST-DXWH	Shoulder Rest - Deluxe White			<input checked="" type="checkbox"/>

Unmark All | Mark All

Remove | Transfer | Preview | Cancel

## 7.1 Assigning Item Ranges to Catalogue Sections

The Assign Item Range To Section window will open with details of the current level and section selection. Item ranges are assigned by Item Number, Generic Description and by Class ID. The current level and section will be displayed whether items are to be added to or removed from a section.

### To assign or remove an item range to an catalogue section in the Assign Item Range To Section window:

1. Click All to assign all records or From to assign a selection of records for Item Number, Generic Description and Class ID. If you select From, enter To and From values to specify a range, or use the lookups.
2. You can further specify your range by using the Contains/Begins with option. From the drop-down menu select between Item Number, Item Description, Item Class and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you have selected Consumables as a Class ID range, but know that you only want to assign Consumables that contain the letters "Ch", you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e.: upper or lower case) will be taken account of in defining your selected range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.



3. Click the Preview button to view your selection in the scrolling window. The Item Number and Item Description of each item to be assigned will be displayed. Click the Show button to display the Generic Description, Class ID and Item Short Name.
4. You can use the Unmark All and Mark All to deselect/select all items displayed in the scrolling window. Alternatively, you can click on each item's Include check box to mark/unmark it.
5. Click the Transfer button to assign the selected item range to the section. If you are removing items from a section then click the Remove button. Click OK to close the Transfer completed successfully dialog box.
6. Click Cancel to return to the [Catalogue Maintenance window](#).

Note that you can click Cancel at any point to return to the Catalogue Maintenance window without saving any changes.

## Inventory

### 8. Maintain Item Catalogue Lookup Defaults window



*Cards >> Myridas >> Catalogue Based Sales >> Catalogue Lookup Defaults Maintenance*

Use the Maintain Item Catalogue Lookup Defaults window to:

- Set defaults for the Item Catalogue Lookup window

*The Maintain Item Catalogue Lookup Defaults window*

#### 8.1 Setting defaults for the Item Catalogue Lookup window

Note that most settings in the window can be changed within the [Item Catalogue Lookup window](#) itself. The only exceptions to this are Include Item Attributes, Include Item Catalogue, Include Item Search and the List View Options.

**To set defaults for the Item Catalogue Lookup window in the Maintain Item Catalogue Lookup Defaults window:**

1. To set these defaults across the entire system click General. If your defaults are for a specified user then click User and enter a user or click the lookup to select a user from the Users window.

2. To display Item Attributes on the Item Catalogue Lookup window click the Include Item Attributes check box. Then use the Default Attributes drop-down menus to select which attributes will be shown in the Item Catalogue Lookup window.

Note that displayed attributes may be amended as required in the Item Catalogue Lookup window.

3. To display the Item Catalogue on the Item Catalogue and Search window click the Include Item Catalogue check box.
4. To only search the catalogue section currently highlighted in the Item Catalogue Lookup window click the Include Catalogue in Search option.
5. To display the Item Search function on the Item Catalogue and Search window click the Include Item Search check box.
6. To further specify your search range use the Contains/Begins with option. From the drop-down menu select between Item Number, Item Description, Item Class, Generic Description, Short Description and Item Class Description. Then select Contains or Begins with from the next drop-down menu, then enter the required letters in the text box.

For example, if you (or a specified user) will only be searching for Items containing the letters Ch, you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e.: upper or lower case) will be taken account of in defining your search range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

7. To remove any search parameters that have been set up (see step 7 above) click Clear Search Parameters.
8. The Default Site Filter option allows you to select a site from which to display items in the Item Catalogue Lookup window. To specify a site choose from the drop-down menu.

Note that sites other than the default may be viewed in the Item Catalogue Lookup window, by using the appropriate drop-down menu.

9. Click the Only Show Available option to only items where stock is available for sales will be displayed.

Note that this setting can be deactivated in the Item Catalogue Lookup window.

10. In Maximum Items type the number of items that you want to be displayed on the Item Catalogue Lookup screen at any one time.
11. When in the Item Catalogue Lookup window pressing an alphanumeric key will take you to the first Item Number in the scrolling window beginning with

that letter/number. If you select Keypress On Item Description then pressing the key will take you to the first Item Description beginning with that letter.

12. The List View Options displays the columns and buttons that can be included on the Item Catalogue Lookup window (see [Using the Item Catalogue Lookup window](#) for more details). If there are any options that you do not want to be displayed then ensure that they are unchecked.

Use the Mark All/Unmark All buttons to select/deselect all columns/buttons or click on them to select/deselect individual options. Note that you should double click the text and not the check box to select an option.

13. From the Price Method drop-down menu select the pricing source to use in the catalogue. By default Great Plains pricing will be selected. If you have Horizon third party pricing software installed on your system then you can select to use this as your pricing source.

14. Click Save to save any defaults that you have set.

Note that you can click Clear at any point to clear any changes that you have made. You can also click Delete to delete any default settings that you have made.

## 9. Item Catalogue Lookup window



*Cards >> Inventory >> Item >> Extras >> Additional >> Item Catalogue*

Use the Item Catalogue Lookup window to:

- Perform parameter-based searches for items
- Browse the item catalogue for items
- View and email item specifications
- Link to other information screens

The Item Catalogue Lookup window

Item Attributes

Item Search

Item Properties

Item Catalogue

Item Number	Item Description	Available	Unit of Measure	List Price	Purch. On Order	Other Sites
ACCS-HDS-...	Headset: Single Ear	38	Each	\$2.00	0	0

Note that the display of the Item Catalogue Lookup window is dependent upon the selection made in the [Maintain Item Catalogue Lookup Defaults](#) window, for example, the window could be set to display the catalogue and search but not attributes, to display attributes only and so on.

Also note that certain buttons on the Item Catalogue Lookup window will only be enabled if you have access to the relevant Myridas modules (see [Appendix B](#)).

## 9.1 Using the Item Catalogue Lookup window

This section describes the full range of options available in the Item Catalogue Lookup window.

### To use the Item Catalogue Lookup window:

1. The default attributes set in the Maintain Item Catalogue Lookup Defaults window are displayed at the top of the screen. Only items with these attributes will be displayed in the bottom window.

You may change these defaults as required by selecting alternative options from the drop-down menus, or select Not Applicable to perform a non-attribute based Search.

2. You can further specify your range by using the "Search for an" option. (Note that this may have been set to a default in the Maintain Item Catalogue Lookup Defaults window). From the drop-down menu select between Item Number, Item Description, Item Class, Item Class Description and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you want to search for items that contain the letters "Ch", you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e.: upper or lower case) will be taken account of in defining your selected range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

When searching for a contains option you can select multiple strings. For example, searching for "ch+ay" would search for items containing the letters "ch" and "ay".

If you are displaying the catalogue tree view then there is an additional search field Catalogue section.

This will search for catalogue section within the catalogue tree view itself. The usual multiple string searches using the plus character(+) apply as well as an option to limit the search to sections that have a particular item associated with them. This is done using the character (?) so that selecting 'Catalogue Section' in the drop down list and then entering "ch +ay ?100XLG" into the search field would return all catalogue sections containing the letters "ch" and "ay" that have the item 100XLG associated with them.

3. Clicking Clear Search Parameters will remove any "Search for an" options that you have set and return all displayed attributes to Not Applicable.
4. Clicking Reset To Defaults will reset any search parameters you have amended to those defined in the [Maintain Item Catalogue Lookup Defaults window](#).

5. If you have the Item Catalogue displayed then this will also form part of your search parameters. Use the plus sign  to open up levels of the catalogue, and the minus sign  to close levels. Clicking on a specific catalogue section will lead to the search being performed on that section.
6. Use the Site Filter drop-down menu to select whether you want to search all sites or specified sites.
7. If you only want to search for Only Show Available (only items that have stock available) then click the checkbox.
8. When you have set all your parameters then click the Redisplay button. All items falling within set parameters will be displayed in the scrolling window below.
9. The items found in your search will be displayed by the column list view options you selected in the [Maintain Item Catalogue Lookup Defaults window](#).











The order in which items are displayed can be governed by any of these characteristics. The window will open with Item Number as the characteristic by which items are displayed. Clicking on Item Number will cause items to be displayed in reverse order. Clicking on another characteristic will cause items to be displayed by that characteristic.

You can also move the item characteristic columns to your preferred display by dragging them.

10. To locate a specific Item Number enter the first letter or number of it into your keypad.

Note that if you have selected the Keypress On Item Description in the Maintain Item Catalogue Lookup Defaults window then entering a letter or number will locate the first Item Description beginning with that letter or number.

11. The Maximum Items to be displayed in the window is shown in the bottom corner of the window. This is the default set in the Maintain Item Catalogue Lookup Defaults window. You can change this manually by clicking on it and entering your preferred quantity. Click Redisplay to display the new item list.
12. To search for an item outside of the currently selected catalogue section deselect the Include Catalogue in Search option.
13. To select an item from the list click on it. You then have numerous options.

Button	Action
	Clicking this button will enter the selected item into the Item Maintenance window.
	Clicking this button will set the attribute fields at the top of the window to be populated with the currently selected items attributes. The window will be refreshed to display all items sharing the displayed attributes. Note that this option is only available if you have selected to display attributes in the Item Catalogue Lookup window.
	Clicking this button will display the selected item in the Available to Promise window (see the Great Plains Available To Promise module).
	These buttons are linked to the User Defined item properties set in the Great Plains Internet Information window. If you have entered user defined attributes (for example a word document) then clicking on these buttons will open user defined 1 and user defined 2.
	If you have attached an item image to the selected item in the Great Plains Internet Information window then clicking this button will display that image.
	Clicking this button will open up a new email message with the item image and user defined properties attached. If you have an email address set against the current debtor then this address will be the "To" address for the email.
	Clicking this button will display the selected item in the Item Maintenance window.
	Clicking this button will allow you to make a standard Great Plains note against the selected item.
	Clicking this button will display the selected item in the Available Quantity Breakdown window. The item must be a duty item (see Myridas Duty Processing module).
	You can click this button to save as default any parameters that you have set up in the Item Catalogue Lookup window.



Note that you can click the Cancel button at any point to hide the Item Catalogue Lookup window and return to the Item Maintenance window.

## Sales

### 10. Maintain Item Catalogue and Search Defaults window



*Cards >> Myridas >> Catalogue Based Sales >> Catalogue Defaults Maintenance*

Use the Maintain Item Catalogue and Search Defaults window to:

- Set defaults for the Item Catalogue and Search window

*The Maintain Item Catalogue and Search Defaults window*

#### 10.1 Setting defaults for the Item Catalogue and Search window

Note that most settings in the window can be changed within the [Item Catalogue and Search window](#) itself. The only exceptions to this are Include Item Attributes, Include Item Catalogue, Include Item Search and the List View Options.

**To set defaults for the Item Catalogue and Search window in the Maintain Item Catalogue and Search Defaults window:**

1. To set these defaults across the entire system click General. If your defaults are for a specified user then click User and enter a user or click the lookup to select a user from the Users window.

2. To display Item Attributes on the Item Catalogue and Search window click the Include Item Attributes check box. Then use the Default Attributes drop-down menus to select which attributes will be shown in the Item Catalogue and Search window.

Note that displayed attributes may be amended as required in the Item Catalogue and Search window.

3. To display the Item Catalogue on the Item Catalogue and Search window click the Include Item Catalogue check box.
4. To only search the catalogue section currently highlighted in the Item Catalogue and Search window click the Include Catalogue in Search option.
5. To display the Item Search function on the Item Catalogue and Search window click the Include Item Search check box.
6. To further specify your search range use the Contains/Begins with option. From the drop-down menu select between Item Number, Item Description, Item Class, Generic Description, Short Description and Item Class Description. Then select Contains or Begins with from the next drop-down menu, then enter the required letters in the text box.

For example, if you (or a specified user) will only be searching for Items containing the letters Ch, you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e.: upper or lower case) will be taken account of in defining your search range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

7. To remove any search parameters that have been set up (see step 7 above) click Clear Search Parameters.
8. The Default Site Filter option allows you to select a site from which to display items in the Item Catalogue and Search window. To specify a site choose from the drop-down menu.

Note that sites other than the default may be viewed in the Item Catalogue and Search, by using the appropriate drop-down menu.

9. Four further options are also available:

Only Items on Promotion	Only items on Extended Pricing promotions will be displayed (requires Great Plains Extended Pricing)
Only Show Available	Only items where stock is available for sales will be displayed
Only Items on a given Template	Select Historical Template or Default Template. Only items that appear on the selected template will be displayed (requires Myridas Customer Templates)

Only Items with a Sales Pattern Warning	Only items with a sales pattern warning will be displayed (requires Myridas Sales Pattern Analysis)
---	---

Note that these settings can be deactivated in the Item Catalogue and Search window.

10. In Maximum Items type the number of items that you want to be displayed on the Item Catalogue and Search screen at any one time.
11. When in the Item Catalogue and Search window pressing an alphanumeric key will take you to the first Item Number in the scrolling window beginning with that letter/number. If you select Keypress On Item Description then pressing the key will take you to the first Item Description beginning with that letter.
12. The List View Options displays the columns and buttons that can be included on the Item Catalogue and Search window (see [Using the Item Catalogue and Search window](#) for more details). If there are any options that you do not want to be displayed then ensure that they are unchecked.

Use the Mark All/Unmark All buttons to select/deselect all columns/buttons or click on them to select/deselect individual options. Note that you should double click the text and not the check box to select an option.

See [Appendix C](#) for details of how to set up margin calculations.

13. From the Price Method drop-down menu select the pricing source to use in the catalogue. By default Great Plains pricing will be selected. If you have Horizon third party pricing software installed on your system then you can select to use this as your pricing source.
14. Click Save to save any defaults that you have set.

Note that you can click Clear at any point to clear any changes that you have made. You can also click Delete to delete any default settings that you have made.

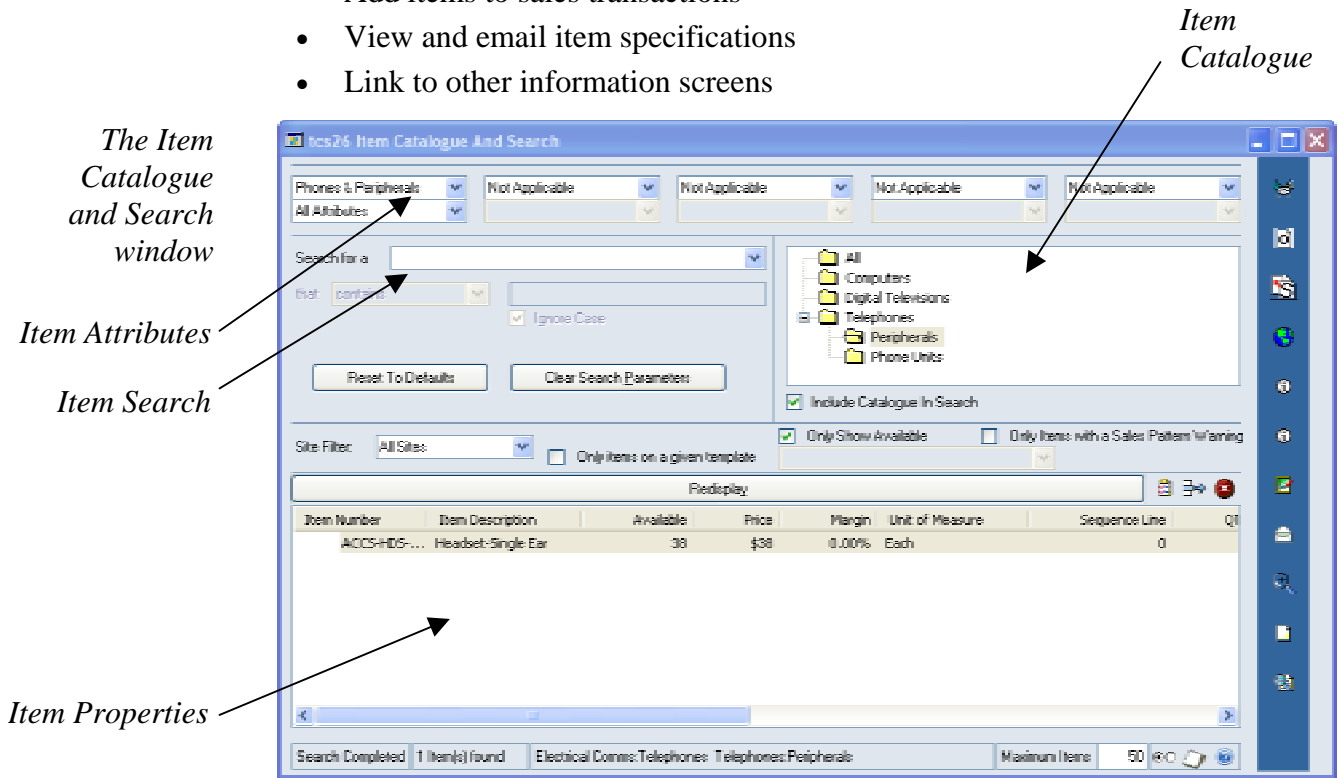
## 11. Item Catalogue and Search window



*Transactions >> Sales >> Sales Transaction Entry >> Extras >> Additional >> Item Catalogue*

Use the Item Catalogue and Search window to:

- Perform parameter-based searches for sales options
- Browse the item catalogue for sales options
- Add items to sales transactions
- View and email item specifications
- Link to other information screens



Note that the display of the Item Catalogue and Search window is dependent upon the selection made in the [Maintain Item Catalogue and Search Defaults window](#), for example, the window could be set to display the catalogue and search but not attributes, to display attributes only and so on.

Also note that certain buttons on the Item Catalogue and Search window will only be enabled if you have access to the relevant Myridas modules (see [Appendix B](#)).

## 11.1 Using the Item Catalogue and Search window

This section describes the full range of options available in the Item Catalogue and Search window.

### To use the Item Catalogue and Search window:

1. The default attributes set in the Maintain Item Catalogue and Search Defaults window are displayed at the top of the screen. Only items with these attributes will be displayed in the bottom window.

You may change these defaults as required by selecting alternative options from the drop-down menus, or select Not Applicable to perform a non-attribute based Search.

2. You can further specify your range by using the "Search for an" option. (Note that this may have been set to a default in the Maintain Item Catalogue and Search Defaults window). From the drop-down menu select between Item Number, Item Description, Item Class, Item Class Description and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you want to search for items that contain the letters "Ch", you could select Item Description, Contains, Ch.



Note that if you deselect Ignore Case, then the Case (i.e.: upper or lower case) will be taken account of in defining your selected range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

When searching for a contains option you can select multiple strings. For example, searching for "ch+ay" would search for items containing the letters "ch" and "ay".

If you are displaying the catalogue tree view then there is an additional search field Catalogue section.

This will search for catalogue section within the catalogue tree view itself. The usual multiple string searches using the plus character(+) apply as well as an option to limit the search to sections that have a particular item associated with them. This is done using the character (?) so that selecting 'Catalogue Section' in the drop down list and then entering "ch +ay ?100XLG" into the search field would return all catalogue sections containing the letters "ch" and "ay" that have the item 100XLG associated with them.

3. Clicking Clear Search Parameters will remove any "Search for an" options that you have set and return all displayed attributes to Not Applicable.
4. Clicking Reset To Defaults will reset any search parameters you have amended to those defined in the [Maintain Item Catalogue and Search Defaults window](#).

5. If you have the Item Catalogue displayed then this will also form part of your search parameters. Use the plus sign  to open up levels of the catalogue, and the minus sign  to close levels. Clicking on a specific catalogue section will lead to the search being performed on that section.
6. Use the Site Filter drop-down menu to select whether you want to search all sites or specified sites.
7. If you only want to search for Only Items on Promotion (requires Great Plains Extended Pricing), Only Show Available (only items that have stock available), Only Items with a Sales Pattern Warning (requires Myridas Sales Pattern Analysis module) or Only items on a given template (requires the Myridas Customer Templates module) then click the relevant option.

If you select Only items on a given template then you can select a template from the drop-down menu.

8. When you have set all your parameters then click the Redisplay button. All items falling within set parameters will be displayed in the scrolling window below.
9. The items found in your search will be displayed by the column list view options you selected in the [Maintain Item Catalogue and Search Defaults window](#).

See [Appendix C](#) for details of how to set up margin calculations.






The order in which items are displayed can be governed by any of these characteristics. The window will open with Item Number as the characteristic by which items are displayed. Clicking on Item Number will cause items to be displayed in reverse order. Clicking on another characteristic will cause items to be displayed by that characteristic.

You can also move the item characteristic columns to your preferred display by dragging them.

If you are using Site Specific Pricing (see Myridas Extended Pricing Enhancements) then site specific prices will be displayed.

If you have the Pricing Indicator column enabled then a **C** denotes and contract price and an **A** denotes an aggregate price.








The following icons also provide further item information:









	Item is a template item
	Item is a promotional item
	Item is both a template and promotional item

10. To locate a specific Item Number enter the first letter or number of it into your keypad.

Note that if you have selected the Keypress On Item Description in the Maintain Item Catalogue and Search Defaults window then entering a letter or number will locate the first Item Description beginning with that letter or number.

11. The Maximum Items to be displayed in the window is shown in the bottom corner of the window. This is the default set in the Maintain Item Catalogue and Search Defaults window. You can change this manually by clicking on it and entering your preferred quantity. Click Redisplay to display the new item list.
12. To search for an item outside of the currently selected catalogue section deselect the Include Catalogue in Search option.
13. To select an item from the list click on it. You then have numerous options.

Button	Action
	Clicking this button will enter the selected item into the current Sales Transaction Entry.
	Clicking this button will set the attribute fields at the top of the window to be populated with the currently selected items attributes. The window will be refreshed to display all items sharing the displayed attributes. Note that this option is only available if you have selected to display attributes in the Item Catalogue and Search window.
	Clicking this button will display the selected item in the Available to Promise window (see the Great Plains Available To Promise module).
	Clicking this button will display the selected item in the Order History window (see the Customer Templates Module).
	Clicking this button will open the Substitutes window, containing details of the item substitutes available. If you want to insert one of these into the sales order click the Select Item button.
	Clicking this button will open the Quantity By Site window (see the Great Plains Advanced Distribution module).
	These buttons are linked to the User Defined item properties set in the Great Plains Internet Information window. If you have entered user defined attributes (for example a word document) then clicking on these buttons will open user defined 1 and user defined 2.

	If you have attached an item image to the selected item in the Great Plains Internet Information window then clicking this button will display that image.
	Clicking this button will open up a new email message with the item image and user defined properties attached. If you have an email address set against the current debtor then this address will be the "To" address for the email.
	Clicking this button will display the selected item in the Item Maintenance window.
	Clicking this button will allow you to make a standard Great Plains note against the selected item.
	Clicking this button will display the selected item in the Price Trace Enquiry window.
	Clicking this button will display the selected item in the Aggregate Pricing Tracker window. The item must be an aggregate item (see Myridas Extended Pricing Enhancements module).
	Clicking this button will display the selected item in the Available Quantity Breakdown window. The item must be a duty item (see Myridas Duty Processing module).
	You can click this button to save as default any parameters that you have set up in the Item Catalogue and Search window.





Note that you can click the Cancel button at any point to hide the Item Catalogue and Search window and return to the Sales Transaction Entry window.

## Appendix A

### Access to Myridas Windows

#### Catalogue Based Sales

Window Name	 Menu Access	 Other Access
Maintain Item Attributes	Cards >> Myridas >> Catalogue Based Sales >> Attributes Maintenance	
Assign Items To Attributes	Cards >> Myridas >> Catalogue Based Sales >> Assign Item Numbers To Attributes	Maintain Item Attributes window >> Assign button
Assign Item Range To Attributes		Assign Items To Attributes window >> Ranges
Assign Attributes To Items	Cards >> Myridas >> Catalogue Based Sales >> Assign Attributes To Item Numbers	
Catalogue Sections	Cards >> Myridas >> Catalogue Based Sales >> Catalogue Section Maintenance	
Catalogue Maintenance	Cards >> Myridas >> Catalogue Based Sales >> Catalogue Maintenance	
Assign Item Range To Section	Catalogue Maintenance window >> Ranges button	
Maintain Item Catalogue And Search Defaults	Cards >> Myridas >> Catalogue Based Sales >> Catalogue Defaults Maintenance	
Maintain Item Catalogue Lookup Defaults	Cards >> Myridas >> Catalogue Based Sales >> Catalogue Lookup Defaults Maintenance	
Item Catalogue and Search	Transactions >> Sales >> Sales Transaction Entry >> Extras >> Additional Item Catalogue	

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	Additional >> Item Catalogue	
Item Catalogue Lookup	Cards >> Inventory >> Item >> Extras >> Additional >> Item Catalogue	

## Appendix B

### Increased functionality with additional Myridas modules

Catalogue window	Module	Additional functionality
Item Catalogue and Search	Duty Processing	Option to display the Available Quantity Breakdown window for duty items
Item Catalogue and Search	Extended Pricing Enhancements	Where applicable prices displayed will be site specific prices  Option to display the Aggregate Pricing Tracker window for aggregate items  Aggregate items will be marked with an <b>A</b> and contract prices with a <b>C</b> in the Pricing Indicator column
Item Catalogue and Search	Sales Pattern Analysis	Option to select Only Items with a Sales Pattern Warning. Sales period quantities and warnings can be displayed in the scrolling window
Item Catalogue and Search	Customer Templates	Order History button opens the Order History window  Option to view Only Items on Historical Template  Template sequences can be displayed in the scrolling window
Item Catalogue Lookup	Duty Processing	Option to display the Available Quantity Breakdown window for duty items

Maintain Item Catalogue And Search Defaults	Duty Processing	Option to select as a default the Consolidated Available Breakdown button
Maintain Item Catalogue And Search Defaults	Extended Pricing Enhancements	Option to select as a default the Aggregate Pricing Information button
Maintain Item Catalogue And Search Defaults	Sales Pattern Analysis	Options to select as defaults sales periods, sales period warnings, and only items with a sales pattern warning for the item catalogue.
Maintain Item Catalogue And Search Defaults	Customer Templates	Option to select as a default the Order History button  Option to select as a default Only Items on Historical Template  Option to have template sequence as a column
Maintain Item Catalogue Lookup Defaults	Duty Processing	Option to select as a default the Consolidated Available Breakdown button

## Appendix C

### Margin Percentage Setup window

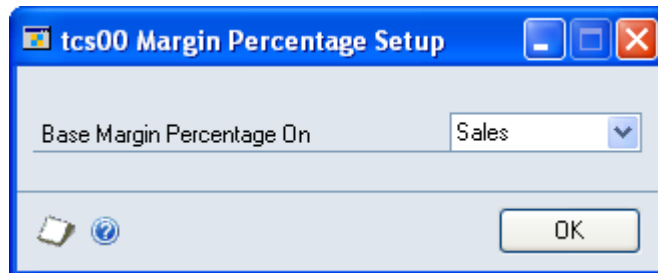


*Tools >> Setup >> Myridas >> Margin Percentage Setup*

Use the Margin Percentage Setup window:

- Setup document margin calculation details

*The Margin Percentage Setup window*



The settings made in this window will define how document margins displayed in the [Item Catalogue and Search window](#) are calculated. See below for further details.

Note that the settings made in this window also set how the margin is calculated in the Price Negotiation window (see Myridas Price Negotiation) and the Document Margins window (see Myridas Distribution Enhancements).

### Setting Up Document Margin Calculation Details

#### To setup document margin calculations in the Margin Percentage Setup window:

1. From the Base Margin Percentage On drop-down menu select Costs or Sales.

The margin is the sum of all extended prices minus the sum of all unit cost prices for items on a transaction. The margin percentage is calculated dependant on your selection:

<b>Sales</b>	Margin / Total sales value for document lines
<b>Costs</b>	Margin / Total cost value for document lines

2. Click OK to save your settings and close the window.

# Index

## A

- Additional Module Functionality..... 7
- Assign Attributes To Items window ... 13
- Assign Item Range To Attribute window  
..... 11
- Assign Item Range To Section window  
..... 20
- Assign Items To Attributes window .... 9
- Assigning
  - an item range to an attribute ..... 11
  - attributes to items ..... 13
  - item ranges to catalogue sections ... 21
  - items attributes..... 10

## C

- Catalogue Based Sales ..... 6
- Catalogue Maintenance..... 6
- Catalogue Maintenance window ..... 17
- Catalogue Sections..... 6
- Catalogue Sections window ..... 15
- Catalogue Tree View ..... 7
- Creating
  - catalogue sections ..... 15
  - catalogues ..... 18
  - item attributes ..... 8

## D

- Deleting
  - catalogue sections ..... 15
  - item attributes ..... 8
- Document Margins
  - setting up calculation details ..... 41

## E

- Editing
  - catalogue sections ..... 15
  - catalogues..... 18
  - item attributes..... 8

## I

- Item Attributes..... 6
- Item Catalogue and Search..... 7
- Item Catalogue and Search window ... 32
- Item Catalogue Lookup window ..... 25

## M

- Maintain Item Attributes window ..... 8
- Maintain Item Catalogue and Search
  - Defaults window ..... 29
- Maintain Item Catalogue Lookup
  - Defaults window ..... 22
- Maintaining
  - catalogues..... 18

## S

- Setting
  - defaults for the Item Catalogue and  
Search window ..... 29
  - defaults for the Item Catalogue  
Lookup window ..... 22

## U

- Using
  - the item catalogue and search window  
..... 33
  - the item catalogue lookup window 26